



# **Evaluation of TV viewing for the 2015 Tour de France**

**An international perspective**

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# 1. DATASET

- In this report, Tour de France TV viewing in 12 countries/regions is analysed: Australia, Belgium (Flanders), Belgium (Wallonia), Denmark, France, Germany, Italy, the Netherlands, Norway, Spain, the UK and the US.
- Except for the US where only a global average is available, detailed stage level data were collected for all countries.
- Except for Italy, for all countries a historical comparison over the 2010-2015 period is available.
- In total, 18 TV channels and 24 different Tour de France broadcasts were monitored: 18 race coverage broadcasts and 6 talkshow broadcasts. A complete survey of all the broadcasts is presented in the table below.

# DATASET

Country (Region)	Race broadcaster (duration)	Talkshows (broadcast moment)
Australia	SBS One (unknown)	
Belgium (Flanders)	VRT (full)	VRT: Vive le Vélo (late evening)
Belgium (Wallonia)	RTBf (full)	
Denmark	TV2 (full)	
France	<i>Sequential broadcasts:</i> France3 (first part of the broadcast before 15h) France2 (second part of the broadcast from 15h until finish)	France3: Village Départ (before stage) France2: Vélo Club (after stage)
Germany	<i>Simultaneous broadcasts:</i> ARD (final 1 to 2h only) Eurosport (full)	
Italy	<i>Sequential broadcasts:</i> Rai3 (first part of the broadcast) Rai3 (final part of the broadcast, usually about 1h) <i>Simultaneous broadcasts:</i> Eurosport (full)	Rai3: Tour replay (after stage)
The Netherlands	<i>Simultaneous broadcasts:</i> NPO1 (full) Eurosport (full)	NPO1: Tour etappe (evening) RTL7: Tour du Jour (evening)
Norway	NRK2 (full)	
Spain	<i>Sequential broadcasts:</i> Teledporte (first part of the broadcast) Teledporte (most stages) OR La1 (selected number of stages) (final part of the broadcast, usually about 1h)	
The UK	ITV4 (Highlights show broadcast in early evening)	
The US	NBCSC (unknown)	

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# IMPORTANT REMARKS

- For some countries we have data on sequential broadcasts of Tour de France stages by a single or multiple TV channels (e.g. in France, Italy, and Spain), while for other countries we have simultaneous broadcasts by the public broadcaster and Eurosport (e.g. Germany, the Netherlands and, again, Italy). With sequential broadcasts, TV audiences can not be summed (e.g. in France you cannot sum the TV audiences for France3 with the audiences for France2), while with simultaneous broadcasts this should be done (e.g. in Germany you should sum the TV audiences for ARD with those for Eurosport Germany).
- An international comparison is always awkward. TV audiences in countries with long 4 to 5h broadcasts (e.g. Belgium, Denmark, the Netherlands, Norway) will have artificially lower TV audiences than countries that record TV audiences for only the final 1 or 2h of the race (e.g. Germany, France, Italy, Spain). For instance, in Flanders average TV audiences for this year's Tour de France equal 578,000 but it would have been well over 650,000 if TV audience data were used only from 15h on (like in France), and it would be over 700,000 if only the final hour of the race was used (like in Italy and Spain).

## 2. MAIN CONCLUSIONS

- Tour de France TV viewing has recovered from the dramatically low recorded TV audiences in 2013 and 2014. TV interest in the Tour de France grew significantly in 2015: an overall increase of 13% in TV ratings compared to last year (from 8,2 to 9,3 million viewers) for the 10 countries for which historical information since 2010 has been collected (Australia, Belgium (Flanders & Wallonia), Denmark, France, Germany (Eurosport only), the Netherlands, Norway, Spain, the UK, the US).
- For the first time since 2011, German broadcaster ARD aired the Tour de France. If ARD TV audiences are also included in the analysis, we notice that in the aforementioned 10 countries, the average Tour de France TV audience has been the highest since 2011, with an overall improvement of 4%: from just over 10 million to almost 10,5 million.
- Compared to last year, Tour de France TV audiences have increased in all countries, except for the UK (status quo) and for Italy (-13%). There are very good explanations for this observation: UK TV interest in the Tour de France was already high last year thanks to le Grand Départ in the UK, while Italy's TV ratings were inflated by Nibali's Tour victory.
- Several countries reach a historical peak in TV audience this year: France (only for the final part on France 2), the Netherlands, Norway and Spain. The TV audience increase in the Netherlands is the most impressive one: +62% compared to last year and +8% compared to the previous record from the 2012 Tour de France. Le Grand Départ in Utrecht and having two riders in the top 10 of the GC can explain this result.
- **In general, we conclude that the 2015 Tour de France has been able to reverse the alarming decreasing trend from the 2012-2014 period. We think this is partly the result of a well-chosen stage profile and the fact that the so-called 'top 4' stage riders remained competitive in the race until the very end.**

# AVERAGE VIEWING PER TOUR STAGE international comparison

<i>Regions with complete information</i>	2010	2011	2012	2013	2014	2015	% change vs. 2014	% change vs. peak (since 2010)
Australia	310 000	<u>450 000</u>	398 000	228 000	205 000	<b>263 000</b>	28%	-42%
Belgium (Flanders / Belgium North)	538 000	<u>586 000</u>	522 000	448 000	467 000	<b>578 000</b>	24%	-1%
Belgium (Wallonia / Belgium South)	215 000	<u>280 000</u>	236 000	189 000	188 000	<b>231 000</b>	23%	-18%
Denmark	402 000	<u>460 000</u>	313 000	297 000	259 000	<b>276 000</b>	7%	-40%
France (France 2, after 15h)	3 286 000	3 760 000	3 400 000	3 980 000	3 800 000	<u>4 029 000</u>	6%	1%
France (France 3, before 15h)	1 900 000	2 700 000	2 260 000	<u>2 850 000</u>	2 400 000	<b>2 528 000</b>	5%	-11%
Germany (ARD)	1 257 000	<u>1 268 000</u>	0	0	0	<b>1 170 000</b>	/	-8%
Germany (Eurosport)	380 000	360 000	<u>430 000</u>	<u>430 000</u>	340 000	<b>350 000</b>	3%	-19%
Norway	149 000	172 000	124 000	138 000	146 000	<u>174 000</u>	19%	1%
Spain (final part, "La llegada")	769 000	795 000	1 262 000	1 022 000	1 218 000	<u>1 320 000</u>	8%	5%
The Netherlands (NPO)	771 000	1 020 000	779 000	745 000	680 000	<u>1 104 000</u>	62%	8%
United Kingdom	438 000	563 000	<u>705 000</u>	606 000	625 000	<b>623 000</b>	0%	-12%
United States	<u>456 000</u>	334 000	290 000	287 000	288 000	<b>365 000</b>	27%	-20%
<b>Total</b>	<b>8 971 000</b>	<b>10 048 000</b>	<b>8 459 000</b>	<b>8 370 000</b>	<b>8 216 000</b>	<u><b>10 483 000</b></u>	28%	4%
<b>Total without Germany (ARD)</b>	<b>7 714 000</b>	<b>8 780 000</b>	<b>8 459 000</b>	<b>8 370 000</b>	<b>8 216 000</b>	<u><b>9 313 000</b></u>	13%	6%
<i>Regions with missing information for some years</i>	2010	2011	2012	2013	2014	2015	% change vs. 2014	
Italy (Rai 3, final part, "all'arrivo")	1 090 000	1 027 000	n.a.	n.a.	<u>1 375 000</u>	<b>1 198 000</b>	-13%	-13%
Italy (Rai 3, first part, "diretta")	n.a.	n.a.	n.a.	n.a.	<u>938 000</u>	<b>699 000</b>	-25%	-25%
Italy (Rai Sport)	n.a.	n.a.	n.a.	n.a.	700 000	<i>n.a.</i>	/	/
Italy (Eurosport)	n.a.	n.a.	n.a.	n.a.	75 000	<u>104 000</u>	39%	39%
The Netherlands (for Flemish tv)	n.a.	90 000	n.a.	94 000	<u>118 000</u>	<i>n.a.</i>	/	/
The Netherlands (Eurosport)	n.a.	n.a.	n.a.	n.a.	<i>n.a.</i>	<b>4 000</b>	/	/
Spain (Teledeporte, first part)	n.a.	n.a.	n.a.	436 000	277 000	<u>495 000</u>	79%	14%

(Peak scores for a region are underscored and projected on a blue background.)

### 3. COUNTRY-SPECIFIC INFORMATION

- In Australia on average 263.000 viewers watched the Tour de France, which is 28% better than last year but still 42% below the peak score of 2011.
- TV audiences in Denmark slightly recovered in 2015 with an increase of 7% compared to 2014, but the audiences are still 40% below the 2011 top ratings.
- In Flanders TV audiences were up 24% compared to last year. The total number of viewers almost equals the record TV audience of 586.000 of 2011. With a percentage share of over 10% of Flemish people watching the Tour de France and a market share for some stages of over 70% (stage 17 had a staggering market share of 76,2%, which means that 3 out of 4 people watching TV were watching the Tour), Flanders has the highest TV ratings in the world for the Tour de France.
- In France TV audiences grew by 5% for broadcasts before 15h on France3 and by 6% for broadcasts after 15h on France2. While France3 viewership is still 11% below the top TV audience of 2013, France2 did record a new best score (1% increase compared to 2013). With its 4 million plus TV audience, it is the country in the world that has the highest average per stage number of viewers. Remark this is not the best score ever for France2 since, for example, in 2003 over 4,3 million French TV viewers watched the Tour de France.

- In Germany, ARD had an average TV audience of 1,17 million for the Tour de France stages it aired. This is about 100.000 viewers (8%) less than the number of viewers it attracted in 2010 and 2011. Remarkably, TV viewership for the Tour de France broadcasts on German Eurosport did not suffer from the decision of ARD. Just like in 2014, some 350.000 Germans followed the Tour de France on the sports channel indicating that on average about 1,5 Germans in total watch Tour de France stages. It should be noted that between 1997 and 2005 twice as many Germans (3 million) were interested in the Tour de France.
- In Italy, the final part of the race broadcast on Rai3 attracted close to 1,2 million TV viewers, which is 13% below last year. The first part of the race, also broadcast on Rai3, even lost 25% of its audience compared to last year. Still, it is very difficult to draw any hard conclusions, since we do not have accurate historical data nor do we have any information on the number of TV viewers for the Rai sports channel RaiSport 1, which also aired the Tour de France. The number of TV viewers for Eurosport Italy increased from 75.000 to 104.000.
- In the Netherlands, TV interest in the Tour de France exploded in 2015. Compared to last year, there was a 62% rise in average TV viewership and only for the second time in history, Dutch TV audiences for the Tour de France on Dutch TV exceeded one million. The record score of 2011 was improved by 8% to a new all-time high of 1.104.000 viewers. This is impressive since, in contrast to what is the case for the data for e.g. Germany or Spain, Dutch TV audience data are computed on the basis of 4 to 5h long broadcasts. Viewership on Dutch Eurosport, on the other hand, was marginal with only 4.000 (!) people on average watching the Tour de France stages live.
- For the first time, we were able to collect stage-specific information from Norway. Compared to last year, Norwegian TV interest in the Tour de France grew by 19% to a new record total of 174.000 viewers, marginally breaking the previous best result of 2011.



- Also in Spain a new record TV audience was set. The final part of the stages gathered on average 1,32 million viewers, which is 8% more than in 2014 and 5% better than the previous best score of 2012. However, viewership in Spain largely depends on the broadcaster. If the smaller channel Teledeporte is airing the race, TV audiences are between 0,5 and 1 million, while finals that are broadcast on the major national channel La1 have an audience between 1,5 and 2,2 million people. Changes in TV ratings for the Tour de France in Spain are therefore largely a result of the choices of the broadcasters, that vary from year to year. It should also be noted that the first part of the race (always broadcast on Teledeporte) gathered 'only' about half a million TV viewers on average. The real global stage average TV audience, comparable to the concepts used for e.g. Belgium, Denmark or the Netherlands, is therefore likely to be well below 1 million in Spain.
- In the UK TV audiences remained stable compared to last year and they are 12% below the record set for the 2012 Tour de France (705.000 TV viewers on average), won by Bradley Wiggins. It seems that Christopher Froome is not able to generate the same kind of interest among British cycling fans as Bradley Wiggins, since in his Tour de France wins TV audiences were only 606.000 and 623.000, respectively.
- TV audiences grew significantly in the US with an increase of 27% compared to 2014. This is, however, still 20% below the 2010 level and is only a mere 20-25% of the total number of viewers at the end of the reign of Lance Armstrong in 2004-2005 when over 1,5 million Americans watched the Tour de France.
- Also in Wallonia the number of Tour de France viewers grew considerably (+ 23%) but it is still 18% below the peak of 2011.

## 4. BEST WATCHED STAGES

- Based on detailed individual stage information from 10 countries, we find that stage 20 with the mountain top finish on l'Alpe d'Huez was this year's best watched stage with a global audience of 15,62 million viewers in these countries.
- Stage 19 (Saint-Jean-de-Maurienne – La Toussuire), another mountain stage in the Alpes, comes second in this year's list of best watched stages with a global estimated audience of 13,54 million viewers and a third mountain stage in the Alpes completes the podium: stage 17 (Digne-les-Bains – Pra Loup) was watched by 12,24 million persons. Remarkably, the 'ceremonial' final stage in Paris, which is of little or no importance from a sporting point of view, ranks as the 4<sup>th</sup> best watched stage accumulating 12,14 million viewers.
- Stage 20 was the best watched stage in Australia, Belgium, Denmark, France and Italy. In Germany, Norway and the UK, it was the final stage into Paris that recorded the highest TV audiences while in the Netherlands it was the local stage 2 to Neeltje Jans.

# 10 BEST WATCHED STAGES: International total

(based on detailed information from Belgium North (VRT) & South (RTBf), France (France 2), the Netherlands (NPO), Denmark (TV2), Germany (ARD), Italy (Rai 3), Norway (NRK2), Spain (Teledporte or La1) , Australia (SBS One) and UK (ITV4)

<i>Stage</i>	<i>Viewers (in millions)</i>
<b>Stage 20: Modane – L'Alpe d'Hue</b>	<b>15,62</b>
Stage 19: Saint-Jean-de-Maurienne – La Toussuire	13,54
Stage 17: Digne-les-Bains – Pra Loup	12,24
Stage 21: Sèvres - Parijs / Champs-Élysées	12,14
Stage 10: Tarbes – Arette La Pierre Saint Martin	12,06
Stage 18: Gap – Saint-Jean-de-Maurienne	12,04
Stage 11: Pau – Cauterets	11,95
Stage 15: Mende – Valence	11,76
Stage 12: Lannemezan – Plateau de Beille	11,46
Stage 02: Utrecht – Neeltje Jans	11,23

## BEST WATCHED STAGE PER COUNTRY

<i>Region</i>	<i>Stage</i>	<i>Viewers</i>
Australia	Stage 20: Modane – L'Alpe d'Huez	<b>360.000</b>
Belgium (Flanders)	Stage 20: Modane – L'Alpe d'Huez	<b>844.976</b>
Belgium (Wallonia)	Stage 20: Modane – L'Alpe d'Huez	<b>311.874</b>
Denmark	Stage 20: Modane – L'Alpe d'Huez	<b>498.688</b>
France 2 (after 15h)	Stage 20: Modane – L'Alpe d'Huez	<b>5.780.000</b>
France 3 (before 15h)	Stage 10: Tarbes – Arette La Pierre Saint Martin	<b>3.800.000</b>
Germany	Stage 21: Sèvres - Parijs / Champs-Élysées	<b>1.830.000</b>
Italy	Stage 20: Modane – L'Alpe d'Huez	<b>1.972.000</b>
Norway	Stage 21: Sèvres - Parijs / Champs-Élysées	<b>358.920</b>
Spain	Stage 19: Saint-Jean-de-Maurienne – La Toussuire	<b>2.217.000</b>
The Netherlands	Stage 02: Utrecht – Neeltje Jans	<b>1.947.000</b>
United Kingdom	Stage 21: Sèvres - Parijs / Champs-Élysées	<b>1.161.000</b>

## 5. AVERAGE VIEWING TOUR **TALKSHOWS:** international comparison

Country	Talkshow	2011	2012	2013	2014	2015
Belgium (Flanders)	Vive le Vélo (Eén)	770.000	752.000	774.000	613.000	<b>752.839</b> (+ 22,8%)
France	Village Départ (France 3)	/	+/- 1.000.000	1.234.000	+/- 1.000.000	<b>+/- 1.150.000</b>
France	Vélo Club (France 2)	/	+/- 2.000.000	1.840.000	+/- 2.000.000	<b>+/- 1.850.000</b>
Italy	Tour replay (Rai)	/	/	/	/	<b>613.316</b>
The Netherlands	Tot 2014: De Avondetappe 2015: Studio Tour (Nederland Eén)	1.076.000	877.000	953.000	917.000	<b>856.087</b> (- 6,6%)
The Netherlands	Tour du Jour (RTL 7)	482.000	591.000	424.000	314.000	<b>301.958</b> (- 3,8%)

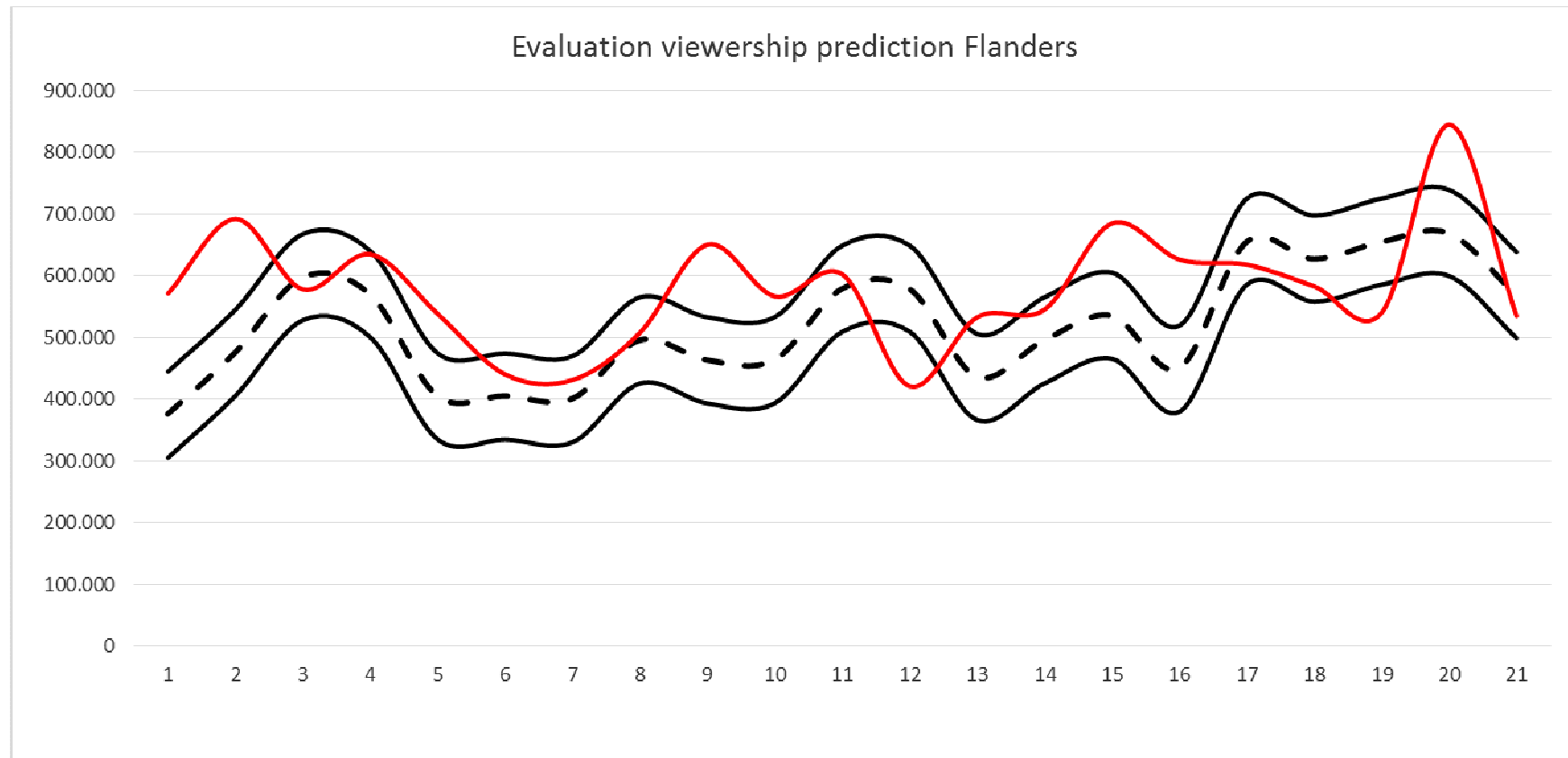
Tv interest in the Flemish talkshow Vive le Vélo increased by well over 20% to reach similar levels as in the 2011-2013 period. In the Netherlands, despite the high TV ratings for the live broadcasts, the two major tour talkshows recorded a further decrease of 3,8 to 6,6% and are the lowest TV audiences for the entire 2011-2015 period. No complete information on viewership for French talkshows was available, but the TV ratings for both Village Départ and Vélo Club seem to be similar to the ones recorded in 2013.

## 6. EVALUATION OF THE **PREDICTION** OF TV AUDIENCES IN FLANDERS AND THE NETHERLANDS

- For the very first time, we not only predicted TV audiences for Flanders, but also for the Netherlands. Both predictions turned out to be too low compared to the actual audiences.
- The model predicting Tour de France TV audiences in Flanders performed not so well this year. While the model projected an average audience of 519.000 per stage, the real Flemish TV audience for the Tour de France was 578.000, an underestimation of 11%. The fact that the so-called 'top 4' stage riders remained competitive in the race until the very end could well be an explanation for this result
- The model predicting Tour de France TV audiences in the Netherlands delivered a remarkable result. Since the average TV viewing per stage was 1.104.000 versus a prediction of only 913.000, the model underestimated the Dutch TV audiences by 21%. But this is largely the result of the extremely high TV audiences for the first two and the last two stages. In fact, for the 17 stages (stage 3-19) in between, predictions are remarkably accurate with only a 5% underestimation (934.000 in reality versus 888.000 predicted). As can be seen from the slide below, most observations (red line) are indeed between the margins the model predicts (black lines).

## EVALUATION OF THE 2015 VIEWERSHIP PREDICTION FOR FLANDERS

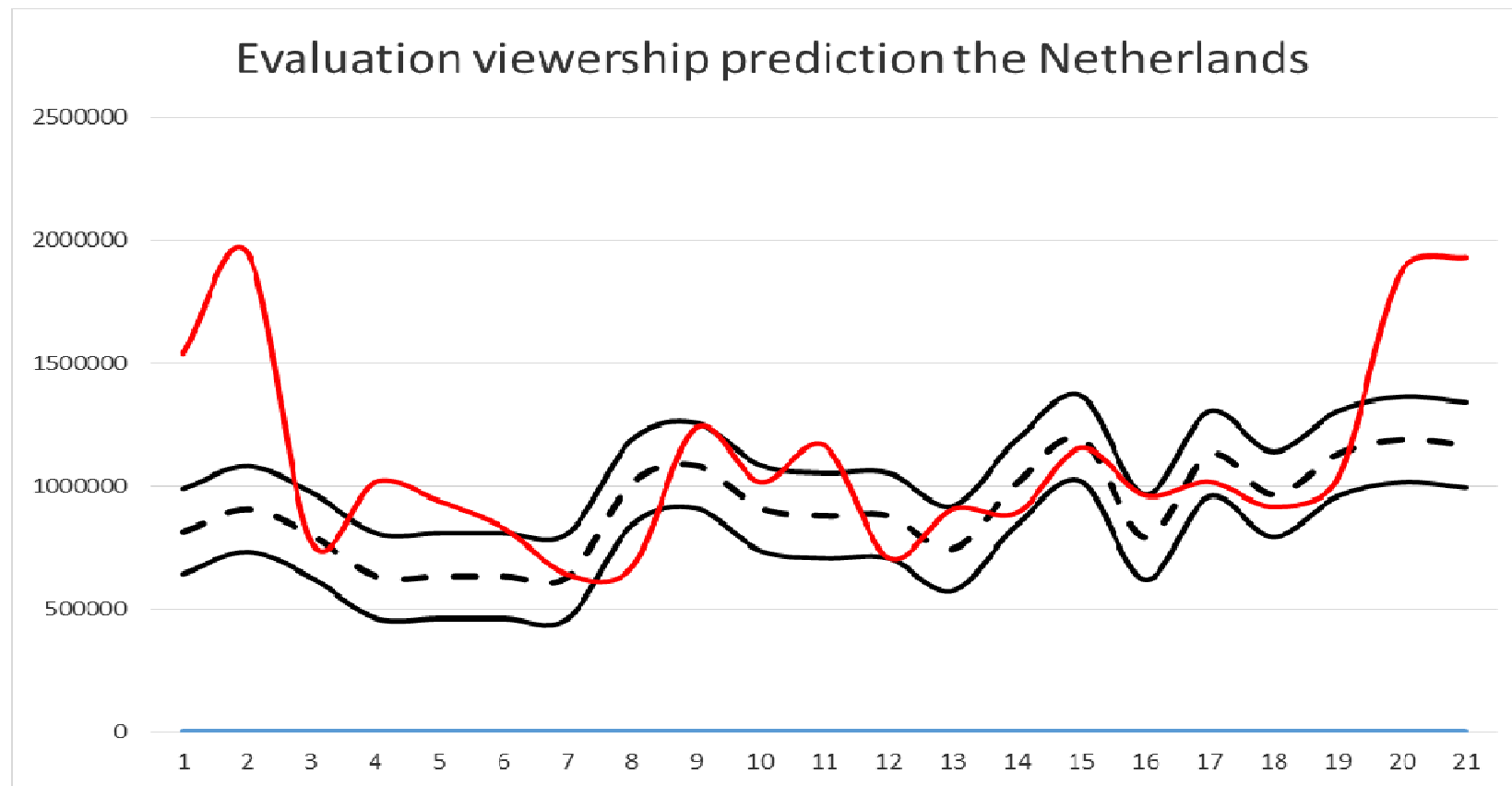
- Average TV viewing (red line) was 578.000 per stage versus a prediction of 519.000 per stage (black dotted line): 11% underestimation.
- For most stages, TV ratings were much higher. The low ratings for mountain stages 12 and 19 are the results of the extremely long broadcasts



(Remark: upper and lower boundaries of predicted values correspond with differences of 1 standard deviation)

## EVALUATION OF THE 2015 VIEWERSHIP PREDICTION FOR THE NETHERLANDS

- Average TV viewing (red line) was 1.104.000 per stage versus a prediction of 913.000 per stage (black dotted line): 21% underestimation
- Extreme values were recorded for first two and last two stages. Predictions from stage 3 til 19 are remarkably accurate with only a 5% underestimation (934.000 in reality versus 888.000 predicted).



(Remark: upper and lower boundaries of predicted values correspond with differences of 1 standard deviation)